

1999 JLARC Workplan

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JOINT LEGISLATIVE AUDIT AND REVIEW COMMISSION
OF THE VIRGINIA GENERAL ASSEMBLY

APRIL 12, 1999

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1. WORK PLANNING PROCESS

The Joint Legislative Audit and Review Commission (JLARC) is the oversight arm of the Virginia General Assembly. It was established by the legislature in 1973 to review and evaluate the operations and performance of State agencies and programs (§30-56 to §30-63 of the *Code of Virginia*).

In 1978, the General Assembly expanded the JLARC oversight role by enacting the Legislative Program Review and Evaluation Act (§30-65 to §30-73). The Act provides for the periodic review and evaluation of selected topics from among the seven budget functions of State government. It also establishes a process for involving House and Senate standing committees in the Commission's study activities. The authority of the Commission to conduct follow-up studies was clarified and formalized by the 1980 General Assembly (§30-58.2). In 1986, the Act was amended to eliminate its sunset provision.

In 1994, the General Assembly passed the Virginia Retirement System Oversight Act (§§30-78 through 30-84). The Act designated JLARC as the legislative agency responsible for carrying out retirement system oversight. The Commission is required by the Act to make certain reports to the General Assembly regarding investments and the actuarial soundness of VRS trust funds. The Commission's oversight activities are guided by a subcommittee appointed by the Chairman.

JLARC also has statutory responsibility to review internal service fund accounts (§2.1-196.1) and to periodically review the codified exemptions and exclusions from the Administrative Process Act (§9-6.14:4.1G).

In 1999, language was added to the Appropriation Act (Item 16 #2c) to provide JLARC with additional funds to expand the technical support staff of JLARC “to assist with legislative fiscal impact analysis” and “to conduct oversight of the expenditure forecasting process.”

How the Planning Process Works

The work planning process is a modified management-by-objective system adapted to serve a small, research-oriented organization like JLARC. The process can be sub-divided into three basic steps -- plan preparation and approval, plan control, and plan evaluation.

Plan Preparation and Approval. The JLARC biennial budget and topic selection processes serve as the foundation for annual workplan preparation. The plan is prepared annually by the Director and the deputy director. Research topics are approved annually by the Commission and the General Assembly. Plan preparation begins after topics have been selected, usually near the end of the legislative session.

The workplan establishes a general framework for defining agency goals and objectives, work activities, a project timetable, and staff assignments for the current year. While there is substantial overlap in JLARC's work, objectives and activities are presented for nine separate program areas:

- *Research Plan and Priorities* -- a brief summary of research expected during the year including target dates for project completion.
- *Virginia Retirement System Oversight* -- a discussion of the continuing oversight activities and research projects for 1997.
- *Fiscal Analysis Unit* -- a discussion of plans to implement a fiscal rate audit process and expenditure forecasting.
- *Other Ongoing Oversight Activities* -- a discussion of JLARC's responsibilities regarding internal service funds and other areas.
- *Division Management* -- a discussion of work activities carried out within each of JLARC's research divisions.
- *Research Methods* -- a listing of work activities to be carried out by the staff methodologist.
- *Information Systems* -- the computer support activities to be managed by the computer resource analyst or other relevant staff.
- *Publications* -- a summary of work activities planned by the publications analyst.
- *Business Management and Office Services* -- an outline of administrative and office services activities.
- *Training* -- a discussion of staff training and development planned for the year.

The plan guides work activities during the year. It is used as a basis for communication among the project leaders, the division chiefs, the business manager, the staff methodologist, the publications analyst, the deputy director, and the Director. It is also used as an aid in project management and problem identification. The plan may be periodically revised to reflect changes in organizational priorities and needs.

Plan Control. The annual workplan is submitted to the Commission for its review and approval. Agency and project managers are provided periodically with information about project scheduling and achievements. Mechanisms for conveying this information include project workplans, weekly planning meetings, monthly planning and project status reports, and personnel time allocation reports.

Weekly planning meetings are held most Monday mornings and feature informal reports on the status of projects and activities. These meetings are used to coordinate activities and to set priorities for administrative support during the week. The staff leadership team, which consists of the Director, deputy director, division chiefs, business manager, and managers of the publications and methods sections, outlines a plan of work for the period preceding each Commission meeting. Following most Commission meetings, the Director calls a meeting of the entire staff. At these staff meetings, the Commission meeting is reviewed, plans for ongoing projects are discussed, and items of general interest to the staff are raised.

Periodic meetings may also be held with project leaders and the leadership team. These meetings are a vehicle for keeping key staff members involved in and informed of important items of organizational and project interest. Communication of plan, project, and other work responsibilities is also accomplished by the preparation of project-specific planning documents and overall organizational directives such as the Research Guide and Administrative Manual.

The leadership team periodically reviews status reports on each of the ongoing research projects. Status reports include such information as the completion date, work phases completed, work accomplished since the last reporting period, and significant report findings. The workplan may be revised from time to time to reflect changes in project scope, status, and priorities.

Time allocation forms are prepared by staff on a weekly basis. These forms are used to track individual and project time and to prepare periodic cost allocation reports when needed.

Plan Evaluation. Four types of outcomes can serve as performance indicators to evaluate the accomplishments of the JLARC workplan:

- *Products* -- studies and oversight reviews produced and reported.
- *Completion of Other Scheduled Activities* -- the extent to which work activities, such as training, management, and administration are effectively completed.
- *Legislative/Executive Utilization* -- (a) the extent to which JLARC reports provide useful information to the General Assembly and executive agencies, (b) the extent to which the legislature and the executive agencies implement Commission recommendations, (c) potential for cost savings accruing to the Commonwealth, and (d) potential for improvements in agency operations and service delivery.
- *Legislative Feedback* -- the extent to which the Commission members, members of the General Assembly, and leadership indicate utilization of the research products and information.

JLARC accomplishments are assessed by follow-up of completed studies and reported biennially in the Report to the General Assembly. The next such report will be prepared in September of 1999.

Oversight Act Planning and Scheduling

Under the provisions of the Legislative Program Review and Evaluation Act (§30-65 to §30-73), the Commission periodically selects and schedules functional areas of State government for systematic review and evaluation. In 1998, the General Assembly passed HJR 137 which directs the Commission to study the functional area of Health and Human Resources. Studies being undertaken as part of this resolution are described in Section 3 of this workplan.

In addition, there remain some study topics from 1995 scheduling resolutions (SJR 262 and SJR 263) for which the Commission has not allocated staff resources. These areas will be studied as directed by the Commission. It is anticipated that a new scheduling resolution will be proposed in the 2000 or 2001 session.

2. JLARC GOAL, STRATEGY, AND PERFORMANCE INDICATORS

The JLARC organizational goal and the strategy for implementing it are as follows:

Goal

Ensure that the legislature has a viable and rigorous oversight capability, that the legislature is informed about program operations, that legislative intent is fulfilled by agencies, and that State programs are carried out in an efficient, effective, and economical manner. Specific management and performance objectives include the efficient and effective implementation of the nine program areas detailed elsewhere in this plan.

Strategy

Conduct research, including agency visits and interviews, other appropriate field work, surveys, literature reviews, hearings, and statistical analyses, to produce documents, reports, and briefings which are presented to the Commission, General Assembly, and Governor for review and consideration.

Performance Indicators

Evaluate the accomplishment of JLARC organizational goals and objectives through the use of performance indicators, as detailed on pages 3 and 4. Achievement of JLARC's goal and strategy is assessed by evaluating the accomplishment of planned activities in the program areas detailed in this plan.

3. RESEARCH PLAN AND PRIORITIES

This segment of the workplan establishes the research plan for 1999. Specific objectives of the research plan are:

- Prepare special studies and reports as requested by the General Assembly or as directed by the Commission.
- Carry out evaluations of selected programs and agencies which are approved for study under the Evaluation Act and the Virginia Retirement System Oversight Act.
- Prepare supplemental reports on completed studies.
- Maintain legislative control of internal service funds, ensuring fund managers have flexibility to operate efficiently and effectively.

Brief summaries of projects scheduled during 1999 are outlined in this section. Research priorities for 1999 are as follows:

PROJECTS TO BE CONCLUDED, CONTINUED OR INITIATED DURING 1999

Update of the Legislators' Guide to the VRS
Review of the Health Regulatory Boards (Final)
Virginia Air Medical Evacuation Services System (MEDEVAC)
Review of State Printing Procurement
Impact of Digital TV on Public Broadcasting Stations
1999 Report to the General Assembly (RGA)
Review of Regional Criminal Justice Training Academy Boundaries
Review of Student Financial Aid
Study of the Impact of State-Owned Ports on Local Governments
Review of VDOT Interstate Maintenance Contract
Review of Grievance Hearings
Review of the Functional Area of Health and Human Resources
(HJR 137)
Review of Information and Referral Centers
Review of Health Department Regulation of Managed Care Health
Insurance Plans
Review of the Department of Health
Review of the Medicaid Reimbursement Methodology
Review of Child Support Enforcement (Interim)

(continued)

Follow-Up Review of Welfare Reform
Revolutionary War Veterans Sites (Interim)
Review of the Virginia Housing Development Authority

Ongoing Virginia Retirement System Studies (Section 4)
Ongoing Reviews of General Fund Expenditure Forecasts (Section 5)
Ongoing Debt Capacity Oversight (Section 6)
Ongoing Internal Service Fund Reviews (Section 6)
Ongoing Inmate Forecast Oversight (Section 6)
Ongoing Review of DPB Performance Measures (Section 6)
Periodic Reports of the Fiscal Analysis Unit (Section 6)

Update of the Legislators' Guide to the VRS

(Planning date for briefing: May 1999)

JLARC staff are required to publish a legislators' guide to the Virginia Retirement System. The first edition of the guide was published in the spring of 1996. Staff are currently revising the guide, with assistance from the VRS. A draft of the second edition is scheduled to be presented to the Commission at the May meeting.

Review of the Health Regulatory Boards (Final)

(Planning date for briefing: June 1999)

House Joint Resolution 139 (1998) and Item 16 of the 1998 Appropriation Act direct JLARC to conduct a review of the effectiveness of the health regulatory boards. Virginia currently has 12 citizen boards that regulate health professionals in the State. These boards are supported by the Department of Health Professions (DHP), and work with the Board of Health Professions, which is comprised of one member from each of the 12 boards as well as five citizen members. The interim report included an assessment of the licensing and rule-making functions of the boards, the composition and structure of the boards, the financial responsibilities of the boards and DHP, and the role of the Board of Health Professions. The final report will examine the disciplinary system used by the boards and department to regulate health professionals in Virginia. The primary purpose of the report will be to assess whether the current disciplinary system adequately protects the public. In addition, the study will consider whether the system protects the rights of health care practitioners.

Virginia Air Medical Evacuation Services System (MEDEVAC)

(Planning date for briefing: July 1999)

Item 16 I of the 1998 Appropriation Act directs JLARC to “study the State Air Medevac System to ensure the continuation of an excellent and efficient statewide emergency medical evacuation services system. The study shall include, but not be limited to, the availability of air medical evacuation services, administrative protocols of service providers, the need for statewide alternatives and options, and the mission, operations, coordination and funding of public and private air Medevac programs.” The study will assess the consistency and coordination of medevac services, the Virginia Department of Health’s role concerning medevac, and funding issues.

Review of State Printing Procurement

(Planning date for briefing: July 1999)

House Joint Resolution 810, approved by the 1999 General Assembly, directs JLARC to review the Commonwealth’s process for procuring printing goods and services through competitive sealed bidding. By law, competitive sealed bidding must be used to procure all printing jobs estimated to cost more than \$30,000. The Department of General Services administers this process. The review will examine the appropriateness of the current printing procurement process and requirements, as well as the Department of General Services’ administration of the process.

Impact of Digital TV on Public Broadcasting Stations

(Planning date for briefing: September 1999)

Item 16 F of the 1998 Appropriations Act directs JLARC to study “the implications of the Federal Communication Commission’s requirement that Public Broadcasting Stations begin digital transmission of television programs in the year 2003, with special regard for programming implications.” It further directs that staff examine the use of existing funding from the Commonwealth by Virginia stations receiving Community Service Grants. To address this mandate, staff will examine: (1) the intended use of the digital technology by the public stations and how these uses may benefit Virginians, (2) the stations’ estimated costs of acquiring the capability to broadcast a digital signal, as well as possible additional costs associated with the conversion, (3) the fiscal management of current State funding at the public stations, and (4) possible funding options should the General Assembly decide to provide additional funding to the public stations for the conversion.

1999 Report to the General Assembly (RGA)

(Planning date for publication: September 1999)

This report is prepared in conformance with Section 30-58.2 of the *Code of Virginia*. The Commission is directed to prepare, at least once each biennium, a report to the General Assembly which includes annotations of reports previously issued, a summary of significant actions taken in response to reports and recommendations, and matters pertaining to report topics that may require additional legislative attention. The 1999 RGA will emphasize JLARC studies completed during the previous three to four years.

Review of Regional Criminal Justice Training Academy Boundaries

(Planning date for briefing: September 1999)

Senate Joint Resolution 411 of the 1999 Session directs JLARC, with the assistance of the Department of Criminal Justice Services, to study methods to standardize the membership of the regional criminal justice training academies. This is a follow-up review, based on a recommendation from the 1998 JLARC review of the training academies. The study will examine the feasibility of establishing permanent service regions for the academies and a standard process for police agencies to join and withdraw from academy membership.

Review of Student Financial Aid

(Planning data for briefing: September 1999)

Item 16J of the 1999 Appropriation Act directs JLARC to review the policies and administration of two types of student financial aid programs: (1) need-based financial aid, and (2) merit scholarships and incentive scholarships. The study mandate states that the objective of the study is “the development of a financial aid system that is both fair to students, and complementary to the Commonwealth’s tuition policy.” This study will use a policy analysis framework, which will consist of four steps. First, the available alternatives for these types of programs will be identified. Second, the goals and objectives for these types of programs will be identified. Third, the criteria for assessing the alternatives will be selected and prioritized. And fourth, the most desirable alternatives will be evaluated in more detail.

The Impact of State-Owned Ports on Local Governments

(Planning date for briefing: October 1999)

Item 16 of the 1999 Appropriation Act directs JLARC to conduct a comprehensive study of the fiscal impact of State-owned ports on the local governments in which the ports are located. Moreover, JLARC is required to

evaluate whether the State funding for services provided by the local governments is sufficient to compensate affected local governments for the loss of local tax and other revenues. This study will focus on the port facilities operated by the Virginia Port Authority.

Review of VDOT Interstate Maintenance Contract

(Planning date for briefing: October 1999)

In 1998 the Commission directed a preliminary review of the contract for maintenance of portions of Interstates 95, 81, and 77. That review was reported in June 1998. At that time, the Commission directed staff to complete a follow-up review of the interstate maintenance contract in 1999. The follow-up review will focus on the contractor's performance in snow and ice removal, and on general maintenance activities for interstate routes in Southwest Virginia. The review will also examine procedures developed by the Virginia Department of Transportation for evaluating contractor performance.

Review of Grievance Hearings

(Planning date for briefing: November 1999)

Item 16 of the 1999 Appropriation Act requires JLARC to conduct a review of State employee grievance hearings. The review is to include an examination of the use of hearing officers. The grievance hearing process is the responsibility of the Department of Employee Relations Counselors (DERC). The study will include a review of DERC's management of the grievance hearing process and the selection and use of hearing officers.

Review of the Functional Area of Health and Human Resources (HJR 137)

(Planning dates for briefings: October, November and December 1999)

House Joint Resolution 137 from the 1998 Session and Item 16 #3c of the 1999 Appropriation Act require a JLARC review in the functional area of health and human resources. Several JLARC reports pertaining to this functional area have been issued since HJR137 was passed, including an interim HJR 137 report about the functional area, a report on welfare reform in Virginia, and an interim report on the regulatory boards for health professionals. During 1999, six reviews are planned to help meet the HJR 137 and Item 16 mandates: a review of Health Department regulation of managed care health plans, a review of information and referral centers in Virginia, a review of the Department of Health, a review of the Medicaid nursing home reimbursement methodology, an interim review of child support enforcement, and a follow-up of the welfare reform study. An overview of each of these studies is provided in the next six synopses.

Review of Information and Referral Centers

(Planning date for briefing: October 1999)

House Joint Resolution 502 of the 1999 General Assembly session requires JLARC to “evaluate the effectiveness of the six regional Information and Referral Centers.” These six regional centers are part of the Statewide Human Services Information and Referral Program that is administered by the Department of Social Services (DSS). According to DSS officials, the information and referral program “is designed to maintain accurate and complete resource data on a statewide basis and link citizens needing human services with appropriate community resources.” There is no eligibility criteria associated with information and referral services and no charge for the services that are provided. HJR 502 specifies that the JLARC study should evaluate the effectiveness of the six regional information and referral centers and determine whether legislative modifications are needed to enable the program to operate more efficiently.

Review of Health Department Regulation of Managed Care Health Insurance Plans

(Planning date for briefing: November 1999)

House Joint Resolution 137 of the 1998 Session directs the Commission to study the monitoring and oversight responsibilities of the Department of Health’s Center for Quality Health Care Services and Consumer Protection. This review will examine how the Department of Health monitors managed care health insurance plans with regard to the quality of care provided. Specifically, the review will examine the process for developing regulations related to the Certificate of Quality Assurance, the Center’s efforts to administer the quality assurance program, and the organization and management of the Center in performing its quality assurance mission.

Review of the Department of Health

(Planning date for briefing: November 1999)

House Joint Resolution 137 from the 1998 Session and Item 16 #3c of the Appropriation Act both specifically require that JLARC study the Virginia Department of Health. Under the mandates, the study is to include a review of the operations and management of the department. Through a survey at the local level, structured interviews, and file reviews, the study will examine the success of the agency in implementing its basic public health functions and assess the soundness of the agency’s overall management structure.

Review of the Medicaid Reimbursement Methodology

(Planning date for briefing: December 1999)

Senate Joint Resolution 463, authorized during the 1999 General Assembly session, directs JLARC to examine the Virginia Medicaid program's methodology for determining nursing facility reimbursement. Nationally, Medicaid is the primary source of public financing for long-term care, with almost 70 percent of nursing home residents relying on Medicaid to pay for their care. Virginia Medicaid payments for nursing home services exceeded \$409 million dollars in FY 1998. Approximately half of these funds are state dollars and the other half are federal dollars. SJR 463 specifically directs JLARC's study of Medicaid reimbursement of nursing facilities to include: a comparison between Virginia's approach with that of other states; an evaluation of "the adequacy of reimbursement levels for providing quality care"; an examination of ways to simplify the reimbursement process; and a determination of "the extent to which patient acuity levels are factored into current and proposed reimbursement approaches."

Review of Child Support Enforcement (Interim)

(Planning date for briefing of the interim report: December 1999)

HJR 553 directs JLARC to evaluate the activities of the Division of Child Support Enforcement (DCSE), including the "local offices." The study will address the operation and management of the child support enforcement function at the State central office and regional office level, as well as the caseload, management, employment levels, workload, efficiency, and effectiveness of the district DCSE offices. If needed, recommendations will be made to improve the efficiency and effectiveness of the program and to better meet the needs of Virginia's children. This study will be conducted in two phases, with an interim report due in 1999 and a final report due in 2000.

Follow-Up Review of Welfare Reform

(Planning date for briefing the follow-up: as scheduled)

The 1999 General Assembly (Item 16 m of the Appropriation Act) directed JLARC to conduct an annual follow-up of the labor market experiences of welfare recipients using the sample from the 1998 JLARC study. Study issues include a review of the labor market experiences and welfare participation rates of VIEW-mandatory recipients over the two-year period since they were assessed for participation in VIEW.

Revolutionary War Veterans Sites (Interim)

(Planning date for briefing of the interim report: December 1999)

Senate Joint Resolution 345 and House Joint Resolution 530 require a JLARC review regarding sites where Revolutionary War veterans are buried. This study is to be conducted with the assistance of the Department of Historic Resources, and in cooperation with the Virginia Association of Counties, the Virginia Municipal League, and other interested associations. For an interim report to the 2000 session of the General Assembly, the study needs to compile a list of sites where veterans are buried. By the conclusion of the review (for the 2001 session), the study also needs to address matters such as: a recommended procedure for adding discovered grave sites to the list; the amount of annual funding that is currently provided; and a recommended "program to restore and preserve all such sites, including the role of public and private entities in such site restoration and preservation."

Review of the Virginia Housing Development Authority

(Planning date for briefing: Summer 2000)

House Joint Resolution 731 of the 1999 Session directs JLARC to study the various programs of the Virginia Housing Development Authority. The study mandate specifically directs that the review include an evaluation of the Section 8 program and a determination if the programs administered by VHDA address the housing needs of low and moderate income Virginians. The review will also examine the performance, operation, management, and organization of VHDA. The Virginia Housing Study Commission is to assist JLARC in this study.

4. VIRGINIA RETIREMENT SYSTEM OVERSIGHT

JLARC's oversight function for the Virginia Retirement System (VRS) is authorized by the Virginia Retirement System Oversight Act of 1994 (§§ 30-78 through 30-84 of the *Code of Virginia*). The Act directs JLARC to oversee and evaluate the Virginia Retirement System on a continuing basis and as directed by the General Assembly.

The objectives of retirement system oversight are:

- Provide timely, accurate information about the retirement system to the General Assembly.
- Assess the appropriateness of the structure of governance for the retirement system and recommend modifications to the structure as necessary.
- Evaluate on a periodic basis the soundness of the retirement system trust funds.
- Evaluate the performance of the VRS investment program and report to the General Assembly on any significant changes in the investment program.
- Evaluate the efficiency and effectiveness of VRS administration and operations.

To implement the retirement system oversight function, the following research activities are planned for 1999.

CONTINUING OVERSIGHT ACTIVITIES

Attend Monthly Meetings of the Board of Trustees and Committees (Ongoing)

JLARC staff will continue to attend the monthly meetings of the VRS Board of Trustees and the Investment Advisory Committee. Staff may also periodically attend meetings of the following committees of the VRS Board of Trustees: administration and personnel, benefits and actuarial, and audit.

Semi-Annual Investment Report

(Planning date for briefings: Summer 1999 and Winter 1999)

JLARC staff will continue to monitor and review the VRS investment program. The focus of the review will remain on investment policy and asset allocation, as well as investment performance and risk management. JLARC staff will obtain detailed information concerning these areas through regular attendance at meetings of the VRS Investment Advisory Committee and the VRS Board of Trustees; structured interviews with VRS investment staff, reviews of VRS documents, reviews of documents of other public employee retirement systems, and analysis of secondary sources of investment data.

Update of the Legislators' Guide to the VRS

(Planning date for publication: May 1999)

JLARC staff are required to publish a legislators' guide to the Virginia Retirement System. The first edition of the guide was published in the Spring of 1996. During 1999 staff will complete a revision of the guide, with assistance from the VRS. Publication of the second edition is planned for May 1999.

Biennial Status Report

(Planning date for publication: Fall 1999)

The Retirement System Oversight Act requires JLARC to prepare a biennial status report on issues related to VRS. Issues for this year's report will include the status of VRS automated systems, including year 2000 remediation; results of the 1998 actuarial valuation; and recent changes in benefit programs and investment policy. The status report will be completed in the Fall of 1999.

5. FISCAL ANALYSIS UNIT

A fiscal analysis unit will be created in 1999. Item 16J of the 1999 Appropriation Act directs JLARC to expand its technical staff, “in order to assist with legislative fiscal impact analysis when an impact statement is referred from the chairman of a standing committee of the House or Senate, and to conduct oversight of the expenditure forecasting process.”

The unit will review legislative fiscal impact statements, prepare long-term expenditure forecasts, and participate in other independent oversight activities for the Commission. The unit will be under the supervision of the deputy director, and will consist of three positions: a section manager and two legislative analysts/economists. The section’s responsibilities will consist of:

- Reviewing fiscal impact statements upon the request of legislative committee chairs. Currently, the executive branch prepares over a thousand fiscal impact statements during each legislative session. Upon the request of a committee chair, the fiscal analysis unit will audit the methodology and results of selected fiscal impact statements. In some cases, the unit may be asked to prepare an alternative statement. Other JLARC staff may supplement the unit as necessary.
- Preparing long-term expenditure forecasts in the areas of Medicaid, adult and juvenile corrections (inmate populations), public school enrollments, and higher education enrollments. These are the major expenditure forecasts in the Commonwealth’s general fund budget.
- Other oversight and research activities that may be assigned to the unit, depending on the volume and nature of work assigned.

The primary objectives for the fiscal analysis unit for 1999 will be twofold. First, JLARC staff will be recruiting candidates for the three positions in the fiscal analysis unit. Once the positions are filled, unit staff will initiate orientation and training in order to develop the necessary level of proficiency for carrying out the functions mandated. Orientation will include establishing liaisons and relationships with other agencies involved in generating fiscal impact statements and the four revenue forecasts. Training will include reviewing forecasting basics and the forecasting models currently used. As staff are hired and trained, reviews of the various expenditure forecasts will begin. Unit staff will begin to review fiscal impact statements during the 2000 Session.

6. INTERNAL SERVICE FUNDS AND OTHER ONGOING OVERSIGHT ACTIVITIES

Internal Service Funds

Internal service funds are monitored on a continuing basis. The Commission reviews the status of fund accounts, and evaluates requests to change the nature and scope of the services provided or the customers served. The Commission also approves in advance the rates employed by fund managers for billing customer agencies. Eleven internal service funds are now monitored by JLARC:

1. The Virginia Distribution Center (Department of General Services) stores and distributes various goods such as canned foods, paints, paper products, and cleaning supplies to State agencies, local governments, and school divisions.
2. The Office of Graphic Communications (Department of General Services) provides graphic design, layout, photography, and typesetting services to State agencies.
3. Maintenance and Repair Program (Department of General Services) implements the rental plan or special maintenance agreements between DGS and entities whose office space is located at the seat of government.
4. The State Surplus Property Operation (Department of General Services) manages and disposes of surplus property for State agencies and institutions.
5. The Federal Surplus Property Operation (Department of General Services) acquires and distributes federal surplus property.
6. The Consolidated Laboratory Services account for laboratory analyses provided for the Department of Environmental Quality and the Department of Agriculture and Consumer Services and for the testing of motor fuels for the Virginia Department of Transportation and of drinking water samples for public water works.
7. The Real Property Program manages transactions involving the sale of State-owned real property.
8. The Computer Services Division (Department of Information Technology) provides data processing services to State agencies.

9. The Systems Development Section (Department of Information Technology) provides automated systems design, development, and maintenance services to State agencies.
10. The Telecommunications Division (Department of Information Technology) provides telephone and data transmission services to State agencies.
11. The Division of Fleet Management (Department of Transportation) operates the State's car pool and manages the fleet of passenger vehicles.

During 1999, the Commission will consider and act on rate changes requested by the internal service fund managers.

Inmate Forecast Technical Committee

Legislation passed during the 1995 Session (HB 2584) requires the development of a prison population forecast based on a consensus forecasting process. The Act provides for the establishment of a technical forecast group comprised of representatives from the Department of Corrections, the Department of Criminal Justice Services, the Virginia Criminal Sentencing Commission, the Joint Legislative Audit and Review Commission, and such experts as shall be appointed by the Secretary of Public Safety from the fields of criminal justice, population forecasting or other appropriate field of study as may be deemed necessary. The Secretary of Public Safety acts as chairman of the technical advisory group. The staff methodologist represents JLARC in reviewing the development of forecast methodologies and alternative forecasts of the State's prison and jail populations.

Debt Capacity Advisory Committee

The JLARC Director is a member of the Debt Capacity Advisory Committee created by the 1994 General Assembly. The Committee is required to review the size and condition of the Commonwealth's tax supported debt and submit to the Governor and General Assembly an estimate of the maximum amount of new tax-supported debt that prudently may be authorized for the next biennium. If necessary, the Director submits an informational memorandum to the chairs of the money committees.

Review of DPB Performance Measures Project

Since 1990, the Department of Planning and Budget (DPB) has been developing performance measures for use by Virginia State agencies. Legislative encouragement of this project has been expressed since the 1992 Appropriation Act mandated a pilot performance measures program. DPB has submitted draft measures to JLARC staff for review and comment. The 1998 Appropriation Act (Item 16B and §4-5.05d) provides that JLARC review and comment on DPB's development of performance measures. A report by DPB on the status of the performance measures project will be scheduled for late 1999.

DSS Local Information Technology Planning Committee

Item 397 B1 of the 1998 Appropriation Act continues a Local Information Technology Planning Committee to provide oversight of automated systems at the Department of Social Services. JLARC is designated as one of five State agencies with membership on the committee, along with five local social service agencies. The chief of one of JLARC's research divisions serves as the JLARC member of the committee. The committee meets monthly.

Competition Council Evaluation Team

At the invitation of the Commonwealth Competition Council, JLARC staff participate in the Competition Council evaluation team, which reviews proposals for privatization of State agency programs and functions. For 1999, the evaluation team will review privatization proposals on an as needed basis.

Juvenile Sentencing Study Advisory Committee

The Virginia Criminal Sentencing Commission in 1997 established an advisory committee on the issue of juvenile sentencing. The role of the advisory committee is to design and create a database of sentenced juveniles that can be used in analyzing issues such as recidivism and sentencing practices. The team leader of JLARC's study series on juvenile justice issues was appointed to serve on the Juvenile Sentencing Study Advisory Committee.

SUMMARY

PLANNED 1999 JLARC PROJECT SCHEDULE

<u>Project</u>	<u>Tentative 1999 Commission Briefing Date</u>
1999 JLARC Workplan	April
1999 Auditor of Public Accounts Workplan	April
Update of the Legislators' Guide to the VRS	May
Fiscal Analysis Unit Progress Report #1	May
Review of Health Regulatory Boards (Final)	June
Virginia Air Medical Evacuation Services System (MEDEVAC)	July
Review of State Printing Procurement	July
No Meeting	August
Impact of Digital TV on Public Broadcasting Stations	September
1999 Report to the General Assembly (RGA)	September
Review of Regional Criminal Justice Training Academy Boundaries	September
Review of Student Financial Aid	September
The Impact of State-Owned Ports on Local Governments	October
Review of Information and Referral Centers	October
Fiscal Analysis Unit Progress Report #2	October
Review of VDOT Interstate Maintenance Contract	October
Review of Grievance Hearings	November
Review of the Functional Area of Health and Human Resources (HJR 137)	November
Review of Health Department Regulation of Managed Care Health Insurance Programs	November
Review of the Department of Health	November
Review of the Medicaid Reimbursement Methodology	December
Review of Child Support Enforcement (Interim)	December
Revolutionary War Veterans Sites (Interim)	December
Fiscal Analysis Unit Progress Report #3	December
Review of the Virginia Housing Development Authority	Summer, 2000
Follow-Up Review of Welfare Reform	As Scheduled
Internal Service Fund Reviews	As Scheduled
Virginia Retirement System – Statutory Oversight	Ongoing
Reviews of General Fund Expenditure Forecasts	Ongoing
Judicial System Completion (Evaluation Act)	As Scheduled

7. DIVISION MANAGEMENT PROGRAM

Research projects are usually assigned to one of two research divisions, each headed by a division chief. Normally, one or more projects will also be assigned to the deputy director, who will carry out the functions of a division chief for those projects. The purpose of division management is to ensure quality products by supporting and monitoring the research and reporting activities of project teams. Division chiefs are responsible for maintaining organizational standards, adherence to deadlines, effective communication, and overall coordination of specific research tasks for each project assigned to the division. Major division chief activities include providing conceptual and research support, evaluating personnel, reviewing products, coordinating organizational resources, substantively editing reports, and carrying out project research and leadership roles when necessary.

The division chiefs accomplish overall goals through a series of objectives and work activities.

Goals and Objectives

- Produce high-quality reports that meet legislative needs for information.
- Promote development of highly skilled and productive research teams.
- Manage projects to achieve reasonable consistency with work plans, deadlines, and staff resources.
- Support staff development through clearly established objectives, performance evaluation, and training.
- Provide input to Director on broad, organizational issues, and participate in organizational planning.
- Promote clear and accurate communication throughout JLARC for project and personnel management purposes.
- Implement effective liaison with legislative committees and subcommittees formed under the Legislative Program Review and Evaluation Act or established for specific projects.

- Provide support to research teams on identifying issues and developing project scope and research workplans.
- Develop and implement a framework for periodic monitoring of team products, processes, and documentation.
- Ensure that teams appropriately secure organizational support in research methods, data processing, and report production.
- Advise teams on effective written and oral presentation of research findings and conclusions.
- Edit reports and briefings, as needed, for substance and style to ensure accurate, clear, and appropriate presentation to various audiences.
- Ensure that legislative committees receive appropriate information and logistical support.
- As necessary, provide project leadership in lieu of team leaders who depart or are otherwise unable to successfully bring a project to closure.

Work Activities

Coordination and management of assigned research staff and projects are the fundamental activities of the divisions. The division chiefs advise their respective teams and monitor products throughout the research and report development process. They also participate in organizational planning, extended project reviews, staff development, and project follow-up activities.

Project Management. Each division chief meets regularly with team leaders and team members for purposes that include concept development, assessment of research and reporting processes and products, and status monitoring. Projects are periodically discussed with the Director.

Extended Review. The extended review process subjects major research products to the rigorous scrutiny of the Director, deputy director, both division chiefs, the staff methodologist, and the publications analyst. The reviews routinely occur at four stages of the research process: (1) pre-scope, (2) scope, (3) workplan, and (4) pre-exposure. At each stage, products are examined for sufficiency of evidence, soundness of conceptualization and recommendations, and clarity of presentation.

Staff Development. Division chiefs participate in the performance appraisal of professional staff. They also provide formal and informal training and technical assistance, as needed, in aspects of project management, team building, research, and reporting.

Legislative Liaison. Division chiefs provide coordination among related projects and serve as a point-of-contact for legislative committees involved with a functional area. As necessary, they facilitate arrangements, transfer of information, and follow-up activities.

8. RESEARCH METHODS

The Research Methods Section supports teams in developing and carrying out sophisticated evaluations of State programs and agencies. The section members consult with project teams concerning individual project needs and train staff members in the use of research techniques.

The 1999 program establishes the objectives and activities for the coming year.

Goals and Objectives

- Support the conceptualization, design, and implementation of research methods and techniques which produce rigorous and valid results for the General Assembly.
- Develop and implement training activities to enhance staff members' capability to conduct applied research.
- Provide timely advice to team members on research design, statistical methods, and data processing techniques to be used in the research process.
- Develop processes for providing technical assistance and consultation on JLARC studies.
- Provide technical assistance in establishing the functions of the Fiscal Analysis Unit.

Work Activities

The research methods section actively participates in team-based projects, training, and special projects.

Team Support. The staff methodologist consults with project teams on a day-to-day basis exploring alternative conceptualizations and designs for studies as well as assisting in implementation of the designs. In 1999 the staff methodologist will also carry a primary research responsibility on the student financial aid study and a supporting role on the medicaid reimbursement methodology study.

Training. Training offers an opportunity to enhance the capability of analysts to conduct research. The staff methodologist assesses the need for methods training and works with the deputy director to develop appropriate courses. Training activities can take several forms, including multiple-session training courses, workshops, individual tutorials, and informal discussion sessions.

Extended Review. The staff methodologist serves as a member of the extended review team. In addition to a general review of team projects, the staff methodologist has a special responsibility for assessing the sufficiency of methods and analysis. The methodologist also verifies major analytic findings of reports.

Research Guide. The staff methodologist works with the deputy director to update the JLARC Research Guide. The Research Guide is an evolving reference which is intended to operationally define, formalize, and enhance research activities at JLARC.

9. INFORMATION SYSTEMS SUPPORT

Information systems support is provided by a number of resources within JLARC to assist teams in developing and carrying out increasingly more sophisticated analyses of State programs. Support activities have included consulting with project teams concerning individual project needs as well as training staff members in the use of computers. Information systems support also makes JLARC research products available to the public through maintenance of a World Wide Web site (<http://jlarc.state.va.us>) on the Internet and publication of a CD-ROM. Currently, most in-house information systems support is provided by the Computer Resources Manager and the publications analyst. Other staff also support this function.

Goals and Objectives

- Provide timely advice to team members on information processing techniques to be used in the research process.
- Provide technical assistance and consultation.
- Enhance the capacity for efficient use of all available information processing resources, including personal computers.
- Expand the availability and accessibility of computer resources used by the research staff.
- Provide JLARC research products to the public on the World Wide Web site and through publication of a CD-ROM.

Maintenance of the World Wide Web site involves updating publications lists, adding new reports for downloading, and ensuring that other information is accurate.

Special activities for 1999 include development of software systems to support the new fiscal analysis unit.

10. PUBLICATIONS AND GRAPHICS PROGRAM

The purpose of the publications and graphics section is to assist teams in the development of research reports and briefings, and to produce high-quality publications for use by the legislature and executive agencies. Two staff members--the section manager/analyst for publications and graphics and the publications assistant (assigned part-time)--carry out the responsibilities of this program area.

The publications analyst serves on the extended review team, supervises the publications assistant and any other personnel assigned to the publications section, and manages work priorities for the section. The publications analyst also provides appropriate staff consultation in report writing and editing, assists team members in conceiving and developing appropriate graphic materials for projects, creates final graphics as necessary, and coordinates with the study team in converting each Commission draft into the final publication. For publication, the analyst oversees the preparation of camera-ready copy, oversees contract printing, and maintains the section's desktop publishing and presentation hardware and software. He also coordinates and finalizes briefing presentations, manages the audiovisual needs of the staff, provides content for JLARC's web site in the required formats, serves as editor for the *VRS Oversight Report* and the *Legislators' Guide to the Virginia Retirement System*, and serves as project leader for the Commission's biennial *Report to the General Assembly (RGA)*.

The publications assistant lays out and finalizes reports for publication, executes selected graphics for drafts and camera-ready copy, produces presentation materials as needed, and works on special projects as assigned.

The publication program realizes its overall goals within JLARC through a series of objectives and work activities.

Goals and Objectives

- Produce high-quality JLARC publications on a timely basis at a reasonable cost.
- Create high-quality informational graphics to enhance the communication of research findings in reports and briefings.
- Serve as a staff resource in the area of audio-visuals, including photography, sound and video recording, presentation technology, graphic information systems, and general communications.

- Work in a consultative capacity with team members, team leaders, and division chiefs on matters relating to the formatting, writing, editing, and use of graphics in research projects.
- Through self-training and systems development activities, maintain in-house, state-of-the-art desktop publishing and presentation systems to meet the organization's publications, presentation, and graphics needs.
- Contribute to the development of publishable research reports by participating in each report's extended organizational review (publications analyst only).
- Develop training programs such as workshops, written guides, and tutorials to increase the staff's skills in writing, presentations, computer software, and graphics.
- Continue to explore audio-visual and computer resources available for JLARC's use and their application in furthering training, professional development, graphics, presentation techniques, report production, and other appropriate areas.
- Take a lead role in special projects as required by the Director, including ongoing follow-up activities related to the biennial *RGA* (next edition due in September 1999).

Work Activities

Report production is the primary responsibility of the publications section. The section meets all of JLARC's needs for graphics and prepares all reports for printing. A variety of other activities related to JLARC's reporting responsibilities are also carried out by the publications section.

Report Production. The publications section prepares all reports for printing as organizational products. The process is comprised of four main phases:

1. *Graphic and editorial consultation.* From the time the project is assigned until the report goes into extended review, the research team works directly with the publications section on the preparation of graphics for report drafts and the briefing. Team leaders may also consult with the publications analyst concerning matters of composition, format, and editing.

2. *Extended review.* The publications analyst participates in every report's extended review process to raise concerns about organization, tone, format, effectiveness of the writing, general content, and graphics.
3. *Editing.* The publications edit of a report manuscript usually commences with the project team's completion of an exposure draft. The draft is reviewed for grammar, coherence, format, clarity of content, and stylistic consistency. Consultations are arranged as necessary with the project team members.
4. *Preparation for printing.* After the team has received the agency responses and made necessary changes to the report, it is given a final review by the publications analyst. The graphics are finalized, the text is transferred from word-processing to JLARC's computerized desktop publishing system, and final format decisions are made. The manuscript is then made camera-ready for printing, reviewed by the team leader and division chief, and approved by the Director. The publications analyst coordinates with the Division of Legislative Automated Systems and the printer under State contract.

Other Products and Responsibilities. Besides producing final reports, the publications section prepares other final informational products for the organization.

1. *Briefing packages.* Commission briefings in Senate Room A use a state-of-the-art digital projection system. The publications analyst maintains and applies this technology according to the agency's needs, as well as providing training to analysts on its use.
2. *VRS Oversight Materials.* JLARC's VRS oversight activities include regular publication of an oversight report, an informational guide for legislators, and other materials. The publications analyst works with the VRS oversight analyst in the production of these materials.
3. *General Communications.* The publications analyst frequently participates in the review and preparation of agency correspondence, award submissions, informational briefings about the agency, internal forms and documents, signage, etc.
4. *Geographic Information System.* When a research project requires the use of a computerized geographic information system (GIS), the publications analyst is responsible for initiating the system,

providing training to the team on its use, and maintaining the graphic files it produces.

5. *Assistance to Other Agencies.* As JLARC's publications and briefings have progressed, other legislative agencies have sought assistance. In the interest of providing the General Assembly with quality products at every opportunity, the JLARC publication analyst has provided extensive consultation and assistance to other legislative agencies.

Publication Training Activities. The publications analyst, in consultation with the Director and deputy director, designs training activities to impart knowledge and improve skills. Private writing tutorials are also arranged upon request. Training areas may include informational graphics, report development, and presentation software.

Special Activities During 1999. *The Legislators' Guide to the Virginia Retirement System* and the *1999 Report to the General Assembly* will constitute major project efforts by the publications analyst this year.

11. BUSINESS MANAGEMENT AND OFFICE SERVICES PROGRAM

The business management and office services section is responsible for the administrative and word processing functions of the office. It is under the general supervision of the deputy director. The business management function includes budgeting, fiscal and personnel activities, along with general administrative management of the office. The Manager of Fiscal and Administrative Services (Business Manager) oversees the daily operations of the section.

Specific goals, objectives, and work activities for the business management and office services section are outlined below.

Goals and Objectives

- Provide a responsive service function for the office's research mission.
- Execute the budget plan and monitor expenses for compliance. Monitor and control expenditures for the current year for appropriateness, accuracy, and timely processing.
- Administer the payroll, oversee the timely completion of evaluations, and activate salary adjustments.
- Conduct all administrative preparation and follow-up for Commission meetings; including polling of members, duplicating and organizing documents, and drafting meeting minutes.
- Manage the time allocation system.
- Assist staff in their efforts to access current information on employee benefits.
- Inform staff of policy and procedural changes or developments.
- Carry out responsibilities as outlined in the records management policies and procedures.
- Ensure that the research staff is provided with accurate and timely word processing and data entry support.

- Coordinate travel arrangements for research teams in the conduct of fieldwork.
- Organize legislative tracking activities.
- Provide opportunities for the support staff to cross-train and enhance their capabilities.

Fiscal and Administrative Services

Budgeting. Budgeting activities include establishing and monitoring the budget plan, and processing and controlling expenditures. The current budget year's expenditures will be monitored and controlled to ensure that prompt payment, reporting, and other established guidelines are met. Appropriate budget worksheets will be prepared to ensure expenditures are maintained within the budget limits.

Payroll/Personnel. Required reconciliations will be completed and leave balances will be monitored to ensure accurate payment to employees and proper withholding. The preparation of personnel evaluations will be monitored to ensure timely completion and processing.

Benefits. Many changes have evolved over the past several years with regard to employee benefits, particularly in the area of health care. In order to keep abreast of health care issues and to provide staff with accurate and current information, the section manager will continue to attend benefit meetings. In addition, the section manager will provide information to and assist employees with flexible reimbursement accounts, optional life insurance, and retirement benefits. Throughout the year, the section manager will also assist employees with updating or changing their health care memberships or plans when qualifying conditions occur. Furthermore, the past two General Assembly Sessions have brought changes to other employee benefits. For example, the Commonwealth has begun offering a short and long-term disability program to employees. Also, the State will increase its contributions to employee deferred compensation plans. As benefits continue to change and evolve, the section manager will strive to distribute accurate and timely information as well as address staff questions.

Records Management. The records manager, with the assistance of the administrative section, will carry out the responsibilities as outlined in the records management policy.

Administrative Manual. The manager will distribute revisions on an ongoing basis. This year, the manager plans to convert the current manual to a pdf format. By automating the administrative manual, labor and other costs

associated with producing hard copy will be reduced. In addition, automation will provide staff with convenient desktop access to the manual.

Document Processing. There will be continued involvement with the research staff to promote a steady workflow of material through word processing and data entry assistance.

Phone/Receptionist Services. The section will provide quality phone and receptionist coverage. A comprehensive schedule of phone/receptionist coverage will be prepared on a monthly basis.

Special Activities During 1999. Passed during the 1998 General Assembly, the Virginia Sickness and Disability Program (VSDP) provides employees with short-term, chronic, and catastrophic protection. Beginning January 1, 1999, the section began implementing the Virginia Sickness and Disability Program (VSDP). As a result of the significant changes to the State's sick leave policy, the section modified its time allocation system to correspond with the new leave alternatives offered through VSDP. Since VSDP is an optional program, the new time allocation system was also designed to track leave for those employees who choose not to enroll in the VSDP. Similarly, the addition of VSDP required updates to a number of policies and procedures.

Building upon last year's conversion to digital document printing and reproduction, the digital printer/copier has now been networked to every staff member's PC. Taking advantage of digital technology continues to streamline as well as increase the quality and efficiency of our printing and copying processes.

The section is also coordinating an effort to replace the agency's carpet. While the furniture or workstations are being "broken down" and reassembled to facilitate installation of the carpet, the agency plans to include the reconfiguration of several workstations, the installation of additional shelving units, and the replacement of some furniture. These improvements will help maximize current office and work space. The agency's last carpeting installation and workstation renovation took place approximately fifteen years ago. Consequently, normal wear over time has necessitated replacement. In addition, some office furniture, including chairs, has been used for up to 25 years.

12. TRAINING AND DEVELOPMENT PROGRAM

Work activities and project assignments in the training and development program are concerned with staff training and professional development. Personal professional development is largely the responsibility of the individual. Each staff member, in conjunction with his or her supervisor, should assess personal strengths and weaknesses. Action should be taken to build on strengths and address weaknesses. The individual can pursue self-directed study (such as a reading program), tutorials, training, university work, or other options. Training as a program is coordinated by the deputy director. The program has multiple goals and objectives.

Goals and Objectives

- Maintain an organizational training program which promotes the accomplishment of agency missions and goals.
- Orient new staff to JLARC processes and procedures.
- Provide staff with greater opportunity to grow and succeed within JLARC.
- Strengthen JLARC's approach to organizational and team management.
- Provide staff members with appropriate training and education to improve their work performance and to enhance their capacity for greater responsibility.
- Provide staff with training on presentational skills and techniques.

Training Program

Staff training activities are designed to improve job performance. Job performance can be enhanced through meaningful learning experiences which impart knowledge, improve skills, or change attitudes.

Needs Assessment. An ongoing assessment of training needs will be conducted for the research and administrative staffs. This assessment will be routinely addressed in leadership planning meetings. This assessment may include: consideration of staff requests for training, review of education and training courses already taken by staff, and review of performance reports.

Training Activities. Based on organizational and individual needs, a training program is designed and implemented annually. This program contains appropriate training and education courses aimed at meeting JLARC's overall training and development needs. While the organization will attempt to provide sufficient opportunities for all staff to acquire the skills necessary for advancement, responsibility ultimately rests with the individual. Staff members should be proactive in identifying and addressing their own individual needs. Opportunities for training include:

- JLARC-conducted classes,
- ongoing JLARC tutorials,
- programs conducted by other State agencies,
- limited university tuition reimbursement for pre-approved coursework,
- consultant-conducted classes or programs at JLARC,
- outside seminars and training sessions,
- self-directed reading programs, and
- others as requested and approved.

Training courses will be designed to strengthen staff research, managerial, technical, and human relations skills.

CommonHealth Schedule

Numerous CommonHealth programs have been planned for 1999. Among those already scheduled include:

Risky Business and Deskercise Challenge. This 45-minute program provides participants instruction on how to make their work site more comfortable and less risky for work day injuries. This program is followed by a month long challenge on performing exercises designed to reduce fatigue and strain. (**March 10, 12 - 12:45 p.m.**)

Safe at Home. The latest information on home safety is shared in this 45 minute program. Safety issues regarding identifying and avoiding criminal behavior, accident prevention, and environmental concerns for all family

members are all discussed. The “It’s a Jungle Out There – Summer Safety Challenge” accompanies this program. The challenge increases participants’ awareness and practice of safety habits while engaging in recreational activities. (**May 18**, 12 - 12:45 p.m.)

Apples and Pears. Designed to provide each participant with alternative ways to assess one’s health status as it relates to body size and shape, Apples and Pears is offered as a 15 minute express program. Correct techniques for determining body mass index will be demonstrated and discussed. (**July 1**, 12:00 – 12:15 p.m.)

Other programs may be scheduled as they are made available through the CommonHealth program. In addition, recurring programs – such as general health screenings, blood drives, and immunizations – may be made available to JLARC staff.

1999 Training Program

An ambitious professional development program is planned for 1999. Specific activities are included in the schedule on page 37. Others will be added as needs or opportunities arise.

1999 TRAINING PROGRAM

Winter

Trainer(s)

Qualitative Methods	Rest
Informational Graphics Workshop	Long
Performance Measures	DPB
Tracker training	Torrence
Pension Fund Trustee Educational Forum	Contractor
Virginia Sickness and Disability Program	Virginia Retirement System

Summer/Fall

Use of DOA Data in Evaluations	State Controller
Software training: intermediate and advanced - Access®, Excel®, and Word®	Local colleges
Commonwealth Management Institute (Selected staff)	State CMI
Virginia Executive Institute (Selected Staff)	State VEI
Informational Graphics Workshop	Long
The Virginia Budget Process	DPB
Confidentiality/anonymity training	Jonas

Fall/Winter

Records management training	Irby
Fixed Assets Accounting System training	State

Ongoing

Individual training	As arranged
Software tutorials	Tittermary, DLAS
New employee orientation	Jonas, Staff
Writing and graphic tutorials	Long
CommonHealth activities	Messick
Financial management training	Bishop
Benefits administration training	Bishop
Payroll training	Bishop